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World Production and Trade

United States Department of Agriculture
Foreign Agricultural Service
Washington, D.C. 20250

Weekly Roundup
WR 49-86
Dec. 10, 1986

ORIGINAL

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

EXPORT SALES

U.S EXPORT SALES Continue to Show Further Gains in Volume Over Last Year. Total sales for export of U.S. wheat, rice and cotton remain well above last season's level. The following table compares accumulated exports and outstanding sales for similar periods in the 1985/86 and the 1986/87 marketing years as reported under FAS's Export Sales Reporting Program. Data for 1985/86 are as of Nov. 28, 1985, while data for 1986/87 are as of Nov. 27, 1986. Accumulated exports are commodities which have been sold and exported. Outstanding sales are commodities which have been sold but not yet exported.

The 1985/86 data for corn and grain sorghum have been adjusted to include shipments reported during the month of September, so a meaningful comparison can be made. Data are measured in thousand units (metric tons/bales).

COMMODITY	YEAR BEGINNING	ACCUMULATED EXPORTS 85/86	ACCUMULATED EXPORTS 86/87	OUTSTANDING SALES 85/86	OUTSTANDING SALES 86/87
Wheat	June 1	12,228	14,439	3,498	2,530
Corn	Sept. 1	10,288	7,955	8,602	5,751
Grain Sorghum	Sept. 1	1,883	1,198	773	841
Soybeans	Sept. 1	4,183	5,692	4,724	4,449
Rice	Aug. 1	703	1,094	234	325
Cotton	Aug. 1	746	1,880	703	3,306

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SALLY KLUSARITZ, Editor, Tel. (202) 447-3448. Additional copies may be obtained from FAS Media and Public Affairs Branch, 5922-S, Washington, D.C. 20250. Tel. (202) 447-7937.

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GRAIN AND FEED

EUROPEAN COMMUNITY Sells Subsidized Wheat to SYRIA. The reported sale of 646,000 tons grain equivalent (GE) of French soft milling wheat and wheat flour to Syria during the past month means that the European Community (EC) will probably supply all of Syria's wheat/flour needs for 1986/87 (July/June). This is in sharp contrast to 1985/86 when France supplied about 40 percent of Syria's needs with 283,000 tons of wheat and 30,000 tons (GE) of wheat flour. The recent sale was comprised of 320,000 tons of soft milling wheat ranging in price from $77.95-81.50 per ton free-on-board (FOB) delivery between December and January, and 326,000 tons (GE) of soft wheat flour for delivery between November and April. While the EC cancelled a special refund targeting farm products to Syria, it apparently continues to offer regular export subsidies which currently amount to about $125 per ton for wheat and $184 per ton for wheat flour.

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THAILAND'S Rice Exports Could Decline in 1987. Low stocks in position for export and a reduction in rice production could lead to a decline in Thailand's rice exports in 1987 to as little as 3.7 million tons, according to the U.S. agricultural attache in Bangkok. Lower Thai rice exports and lower world trade levels in 1987 could possibly strengthen the price for high-quality rice and reduce competition for U.S. rice exports. A delayed harvest is encouraging Thai farmers to hold on to rice stocks until the crop outlook becomes clearer, consequently stocks in export positions are at a relatively low historical level.

DAIRY, LIVESTOCK AND POULTRY

CHINESE Hog Numbers Fall While Pork Production Increases. Chinese hog numbers are expected to have declined 2 percent during 1986 to 324.2 million, according to the U.S. agricultural counselor in Beijing. The decline is due to weak producer returns caused by high feed prices and low hog prices. Pork production for 1986 is expected to be up 6 percent to 17.5 million tons, in part due herd culling. Pork production for 1987 is forecast to rise only slightly to 17.6 million tons.

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ARGENTINE Cattle Production Expected to Fall. Argentine cattle inventories are expected to fall 1.6 million head or 2.7 percent at end of 1986 to 55.9 million, according to the U.S. agricultural counselor in Buenos Aires. High interest rates and government policies to keep domestic beef prices low have discouraged Argentine cattle farmers. Beef production for 1986 is projected up slightly to 2.8 million tons. For 1987, production is forecast to fall to 2.65 million tons. This will put more pressure on domestic beef prices because the government is not encouraging pork and poultry production.

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COTTON AND FIBERS

PAKISTAN Produces Near-record Cotton Crop. According to the U.S. agricultural attache in Islamabad, the cotton crop in the Pakistani provinces of Punjab and Sind is making good progress due to favorable weather. Despite early season problems with insect infestation, especially in the Sind, timely pest control measures have proved effective. Harvesting is nearly complete in the lower Sind with more than 75 percent of the crop delivered to the gins. In the middle Sind, approximately half of the crop has been harvested, while in the upper Sind, picking operations are underway. In the Punjab, about 80 percent of the crop has reached the fruiting state. The first picking is nearly complete and the second picking has begun in most areas. The crop is generally free from pest infestation. Production of cotton in Pakistan is estimated at 5.5 million bales, slightly below last year's record crop of 5.7 million bales.

TOBACCO

Estimate of WORLD Tobacco Production Lowered. The world total unmanufactured tobacco production for 1986 is estimated at 6.5 million tons (farm sales weight basis), down marginally from the June estimate of 6.6 million tons and down 5 percent from the previous year's record crop of 6.8 million tons. The tobacco crop in China, which continues to be the world's largest tobacco producer, remains unchanged from the June estimate of 2.1 million tons and is down slightly from 1985's record crop of 2.3 million tons. In the United States, production is estimated at 540,000 tons, down 10 percent from the June estimate due to a 7-percent downward revision in harvested area, as well as drought coupled with lower effective tobacco quotas. U.S. production in 1985 totaled 685,694 tons. Production prospects also were lowered for Indonesia and Malawi due to adverse weather conditions and for Italy, Nigeria and a number of smaller producing countries.

World flue-cured tobacco in 1986 is estimated at 3.5 million tons, unchanged from the June estimate, but down 6 percent from last year's record crop of 3.7 million tons. Lower estimated output in a number of larger producing countries--including the United States, Zimbabwe, Italy and Malawi--offset larger production estimates for Brazil, Canada, the Republic of Korea, Poland and other smaller producing countries.

The 1986 world burley crop is estimated at 621,897 tons, down 7 percent from June and down 10 percent from a year ago. Output in the United States, the world's largest producer, is estimated at 196,904 tons. The revised U.S. crop estimate is 18 percent below the June estimate due in part to a 9-percent downward revision in harvested area. U.S. production in 1985 totaled 260,044 tons. Wet weather lowered the tobacco crop in Malawi and the current estimate is 9 percent below the June estimate. Rainfall remained above average during most of the early and middle stages of the growing season. Lower crop estimates are also expected in the Republic of Korea and Greece.

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World oriental tobacco production is estimated at 967,042 tons, 1 percent above the June estimate of 954,562 tons and 3 percent above the 1985 crop. In Greece, production is revised up 13 percent to 119,250 tons, primarily as a result of an 8-percent increase in harvested area. Moreover, favorable support prices encouraged some burley producers to switch to oriental types. The production of neutral as opposed to aromatic and taste types is on the rise because neutral types can be grown in more areas and require less care. Greece's 1985 crop totaled 148,466 tons. Favorable weather is responsible for the upward adjustment in production for Italy and Romania.

World dark air/sun-cured tobacco production in 1986 is currently estimated at 1.1 million tons, 1 percent below June estimate and slightly below that of a year ago. Smaller crops in Indonesia, the United States, the Federal Republic of Germany and a number of countries in Africa more than offset production increases in Poland and Italy.

World unmanufactured tobacco production for 1985 and 1986, by leaf type, is as follows in 1,000 tons:

Leaf Type	Revised 1985	Estimated 1986
Flue-cured	3,707	3,473
Burley	688	622
Oriental	937	967
Dark air/sun-cured	1,094	1,066
Light air-cured	140	126
Dark air-cured, cigar	204	198
Dark fire-cured	77	65
Total 1/	6,847	6,517

1/ Total may not add due to rounding.

COFFEE

WORLD Coffee Production Revised Downward. World green coffee production for 1986/87 is estimated at 81.0 million 60-kilogram bags, 2 percent below the June forecast (See WR 24-86) and 16 percent less than the 95.8-million-bag crop produced last season. The current estimate is the lowest since 1978/79 when world production totaled 79.0 million bags. South American production declined 37 percent, due mostly to a 19.1-million bag reduction in Brazil.

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Brazil, the world's largest producer, is estimated to have harvested a coffee crop of only 13.9 million bags for the 1986/87 season, down 58 percent from last year's 33.0-million-bag crop and 16 percent less than the June forecast. The crop was affected by the most serious drought recorded in the last 40 years--two dry spells which each lasted several months. The crop year began with an abnormally dry winter prior to the first bloom and then dryness prevailed again later in the season after the trees had bloomed. This did not permit the already light set of coffee cherries to develop properly and resulted in unusually poor dehusking yields of small-size coffee beans, and a substantial reduction in the weight and volume of the crop harvested. In Colombia, production for 1986/87 is estimated below average but up 3 percent from the previous season and unchanged from the June forecast. Late rains this year in the main producing regions delayed harvest.

Ecuador's coffee crop is estimated to be a record-high 2.1-million bags, 5 percent above last year's previous record. The larger outturn is due to an increase in crop area.

Coffee production in North and Central America and the Caribbean is estimated to be up 13 percent with all the larger producing countries expecting increases. Mexico, the largest producer in the region, is expecting a record crop of nearly 4.7 million bags. In Guatemala, a record-setting crop of 2.95 million is currently estimated, 12 percent more than last year. Growers switched to smaller bush varieties which dramatically increased the number of plants per hectare and improved yields.

El Salvador's coffee outturn is now estimated at 2.4 million bags, down 9 percent from the June forecast but 7 percent more than a year earlier. Costa Rican production is estimated to be up 45 percent because of an improvement in weather and new coffee plantations coming into production.

Africa's 1986/87 coffee production is estimated at 21.3 million bags, 4 percent above last year's harvest. In Cote d'Ivoire (Ivory Coast), the largest producer in the region, this year's harvest is estimated at 4.7 million, down slightly from the June forecast but 8 percent more than last year's harvest. Kenyan coffee production, having substantially recovered from drought by reaching a near-record 2.09 million bags in 1985/86, is estimated at 2.0 million bags in 1986/87. In addition to more favorable weather, an adequate supply of inputs and higher grower prices have contributed to higher levels of production in recent years.

Coffee production in Asia in 1986/87 is estimated at 10.6 million bags, 8 percent more than last season and up 7 percent from the June forecast. Indonesia, the largest producer in this region, is expecting to equal last year's record-high production of 5.8 million bags. The largest increase over last year's crop could occur in India where 1986/87 production is estimated at 2.7 million bags, 33 percent more than the previous season but 17 percent below the record-high 3.25 million bag crop of 1984/85.

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Coffee production estimates by region are as follows in 1,000 60-kilogram bags:

Region	Revised 1985/86	Estimated 1986/87
North and Central America and the Caribbean	14,921	16,925
South America	49,676	31,212
Africa	20 513	21,331
Asia	9,840	10,588
Oceania	879	906
Total	95,829	80,962

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of Dec. 4, 1986, was as follows in metric tons:

	ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS	
52.	Tunisia barley	Dec. 1, '86	150,000	
51.	Gulf countries (Bahrain Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head	
50.	West Africa (Cameroon Cote d'Ivoire, Ghana, Togo) wheat	Oct. 30, '86	345,000	
49.	Dominican Republic poultry	Oct. 29, '86	1,500	Sold 719
48.	Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47.	Cameroon wheat flour	Oct. 14, '86	20,000	
46.	Romania barley	Sept. 24, '86	200,000	Sold 125,000
45.	Venezuela barley malt	Sept. 4, '86	100,000	
44.	Cyprus barley	Aug. 26, '86	150,000	Sold 75,000
43.	Canary Islands wheat	Aug. 8, '86	100,000	
42.	Egypt semolina	Aug. 6, '86	30,000	Sold 15,000
41.	Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40.	Canary Is. dairy cattle	July 28, '86	3,000 head	
39.	Hong Kong table eggs	July 28, '86	44 million	
38.	Senegal wheat	July 17, '86	100,000	COMPLETE
37.	India vegetable oil	July 8, '86	25,000	
36.	Jordan barley	June 17, '86	60,000	

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EXPORT ENHANCEMENT INITIATIVES (CONT)

35.	Israel barley	June 17, '86	200,000	Sold 36,200
34.	Tunisia dairy cattle	May 29, '86	4,000 head	
33.	Algeria dairy cattle	May 29, '86	5,000 head	
32.	Sri Lanka wheat	May 16, '86	125,000	Sold 75,000
31.	Saudi Arabia barley	May 7, '86	500,000	COMPLETE
		Aug. 6, '86	250,000	COMPLETE
		Sept. 16, '86	300,000	COMPLETE
		Oct. 8, '86	200,000	COMPLETE (201,000)
30.	Algeria barley	Apr. 17, '86	500,000	
29.	Morocco dairy cattle	Apr. 16, '86	4,000 head	Sold 3,020
28.	Turkey dairy cattle	Apr. 16, '86	5,000 head	
27.	Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
		Sept. 12, '86	10,000 head	Sold 1,055
26.	Yemen poultry feed	Apr. 14, '86	150,000	
25.	Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
		June 24, '86	200,000	Sold 190,950
		Oct. 7, '86	500,000	
24.	Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
23.	Syria wheat	Apr. 8, '86	700,000	CANCELLED
22.	Benin wheat	Apr. 7, '86	45,000	Sold 30,000
21.	Algeria table eggs	Apr. 4, '86	500 million	
20.	Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 200
19.	Jordan wheat	Mar. 19, '86	75,000	COMPLETE
		June 20, '86	75,000	COMPLETE
18.	Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
		Aug. 22, '86	800,000	Sold 250,000
17.	Algeria wheat flour	Feb. 25, '86	100,000	
16.	Algeria semolina	Feb. 11, '86	250,000	
15.	Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
14.	Zaire wheat	Dec. 27, '85	40,000	COMPLETE
		May 15, '86	40,000	COMPLETE
		Oct. 17, '86	40,000	
13.	Nigeria barley malt	Dec. 10, '85	100,000	Sold 4,400
12.	Iraq wheat flour	Dec. 9, '85	150,000	Sold 100,000
11.	Egypt poultry	Nov. 26, '85	8,000	COMPLETE
		Mar. 21, '86	15,000	COMPLETE
		June 18, '86	5,000	COMPLETE
		July 8, '86	15,000	COMPLETE
10.	Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
		May 15, '86	30,000	Sold 15,000
9.	Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8.	Jordan rice	Nov. 8, '85	40,000	Sold 38,700
7.	Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
		May 8, '86	500,000	Sold 100,000
6.	Morocco wheat	Sept. 30, '85	1,500,000	Sold 890,000

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EXPORT ENHANCEMENT INITIATIVES (CONT)

5.	Yemen wheat	Sept. 6, '85	100,000	COMPLETE
4.	Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
		Apr. 14, '86	100,000	Sold 63,000 LT
3.	Egypt wheat	July 26, '85	500,000	COMPLETE
		Oct. 30, '85	500,000	COMPLETE (512,500)
		June 24, '86	500,000	COMPLETE
		July 29, '86	52,000	Sold 29,000
		Oct. 8, '86	1,000,000	
2.	Egypt wheat flour	July 2, '85	600,000	COMPLETE
		Aug. 6, '86	600,000	
1.	Algeria wheat	June 4, '85	1,000,000	COMPLETE
		Apr. 10, '86	1,000,000	Sold 354,000
		Nov. 10, '86	300,000	Sold 90,000

EXPORT ENHANCEMENT PROGRAM SUMMARY
Status as of Dec. 4, 1986

Announced to Date	16,502,446 (grain equivalent)
	544 million table eggs
	44,500 tons frozen poultry
	52,500 head dairy cattle
	25,000 tons vegetable oil
Sold to Date	6,110,459 wheat
	1,292,622 flour (grain equivalent)
	1,487,200 barley
	20,550 semolina (grain equivalent)
	39,199 barley malt (grain equivalent)
	38,700 rice
	43,719 frozen poultry
	17,750 head dairy cattle
Total Sales Value:	$930.8 million
Estimated Bonus Book Value:	$540.7 million.

TARGETED EXPORT PROMOTION PROGRAM

No announcements were made under USDA's Targeted Export Promotion Program this week.

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Selected International Prices

Item	December 9, 1986		Change from a week ago	A year ago
ROTTERDAM PRICES 1/	$ per MT	$ per bu.	$ per MT	$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%.	N.Q.	--	--	N.Q.
U.S. No. 2 DNS/NS: 14%....	137.50	3.74	-0-	180.50
U.S. No. 2 S.R.W.	N.Q.	--	--	157.00
No. 3 H.A.D.....	152.50	4.15	+2.50	173.00
Canadian No. 1 A: Durum...	156.00	4.25	-2.00	N.Q.
Feed grains:				
U.S. No. 3 Yellow Corn....	86.50	2.20	-0-	122.50
Soybeans and meal:				
U.S. No. 2 Yellow.....	N.Q.	--	--	213.60
Brazil 47/48% Soya Pellets	199.00	--	+20.00	199.00
U.S. 44% Soybean Meal.....	177.00	--	-4.00	180.00
U.S. FARM PRICES 3/				
Wheat.....	88.18	2.40	+0.37	114.63
Barley.....	50.52	1.10	-1.38	74.87
Corn.....	59.45	1.51	-0.39	89.37
Sorghum.....	54.45	2.47 2/	-0.22	78.92
Broilers.....	1,154.77	--	-102.07	1,095.02
EC IMPORT LEVIES				
Wheat 5/.....	191.15	5.20	-3.35	113.55
Barley.....	183.00	3.98	-4.55	114.30
Corn.....	172.55	4.38	-3.20	92.40
Sorghum.....	173.60	4.41	-5.05	102.10
Broilers 4/ 6/ 8/.....	450.00	--	-7.00	241.00
EC INTERVENTION PRICES 7/ 9/				
Common wheat(feed quality)	191.55	5.21	-0.40	167.35
Bread wheat (min. quality)	200.80	5.46	-0.55	178.30
Maize.....	200.80	5.10	-0.55	167.35
Barley and all other feed grains, excluding maize.	191.55	--	-0.40	167.35
Broilers 4/ 6/.....	1,536.00	--	-10.00	1,259.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	N.A.	--	--	57.50
Barley.....	N.A.	--	--	74.95
Broilers 4/ 6/ 8/.....	362.00	--	-6.00	157.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/86 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. N.A.=None authorized. N.Q.=Not quoted. Note: Basis January delivery.

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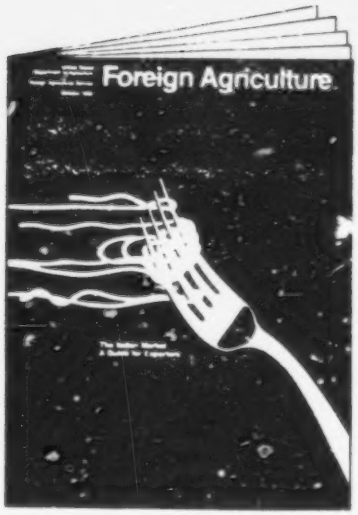

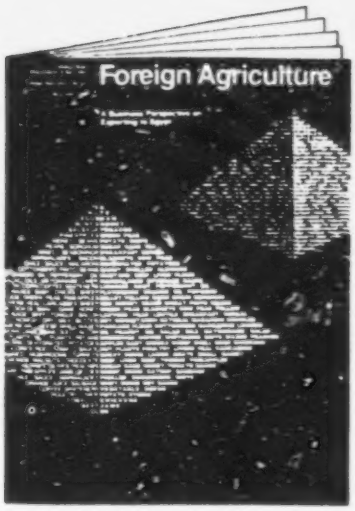

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